



## iLabPOS – Quickstart Guide

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# Version 1.2

July, 2017

## 1. Introduction

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The iLabPOS Quick Start guide will help you setup iLabPOS with all the products and services you sell. Apart from creating the products, the manual will also guide with creating suppliers and categories.

In most Point of Sale systems, and iLabPOS is no exception, products can be split under several categories. For example, in a clothes shop each of your items will be part of a specific category, such as

Jeans

Skirts

Dresses

Accessories

etc...

Whilst not compulsory, separating your products in different categories can come in handy when issuing reports and statistics at the end of the year. If your products are properly categorised, you will be able to know which area of your business is performing better than others.

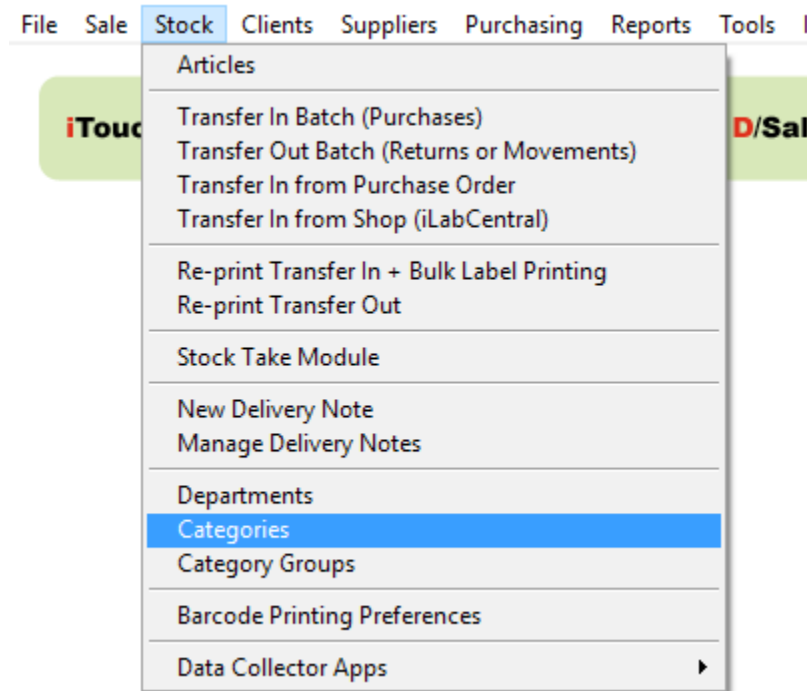
Furthermore, iLabPOS provides you with a Supplier Database, and each product can be combined with a supplier, thus making re-ordering simpler. Again, whilst not compulsory, keeping a supplier database and attaching each product with a supplier has several advantages.

Hence before proceeding with this manual, try and jot down on a piece of paper how you wish to categorise your stock. As a guideline, unless you're not sure, in a small shop you should not have more than 30 categories. If you deem necessary to have more, then do so.

## 2. How To Insert a Category

Your first task is to create categories for your stock. Whilst not compulsory, categorizing your stock can facilitate reporting and allows you to manage your stock effectively.

**Step 1** To add a new category, go to STOCK >> CATEGORIES and click on the  add icon in the toolbar.



**Step 2** Enter the category details as explained below:


- **Category Code** - This is a code you can specify yourself. You can either use a numbering system such as 001, 002, 003 etc.... Alternatively you can use a letter acronym (up to 10 characters), such as FOD for FOOD, DRK for DRINKS, MJS for MEN'S JEANS, etc....
- **Category Name** - This is a short description of your category.
- **Category Group** - Here choose under which category group this category falls. Normally you will choose products. (Advanced users can further group categories under category groups.)

Category Code	<input type="text" value="009"/>
Category Name	<input type="text" value="MEN TROUSERS"/>
Category Group	<input type="text" value="001 - PRODUCTS"/>

or

Category Code	<input type="text" value="0123456789"/>
Category Name	<input type="text" value="MEN TROUSERS"/>
Category Group	<input type="text" value="001 - PRODUCTS"/>

Please note that you should not use long category names when using iTouch. The suggested length is 9 characters. If you want the category to appear in iTouch you need to tick the designated tick box.




**Step 3** Press the  save button. Your new category is now saved.

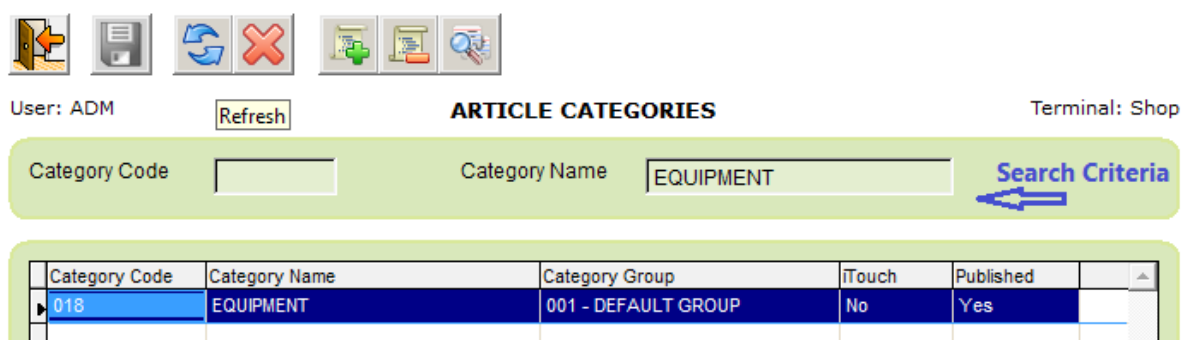
**TIP:** If you are using iLabPOS on a touch screen, certain categories can be made visible on the iTouch module so that products in the category can be chosen using the touch screen. Products which have a barcode do not need to fall in a category visible on iTouch as scanning these products will be enough to sell them. However with certain products without a barcode, such as bread or pastries in a confectioner, or snacks and food in a take away, you will be using the touch screen to select these products. Hence create a category, such as Bread, and tick the "Visible in iTouch" checkbox. Then once you categorise products under bread, you will be able to choose these products using the touch screen making sales faster and easier.

When using iTouch, categories are sorted alphabetically using the code. Use 001, 002, 003 for category codes, using 001 for the first one you want to see, 002 for the next, and so on for the rest.

*Ignore the "Publish on Web Shop" field and all the fields under it. These are applicable only if you have an online shop integrated with iLabPOS.*

## 2. Modify a Category

If you need to modify an existing category, in the main category screen (*STOCK >> CATEGORIES*) where you see the category list, locate and highlight, or search for the category by entering either the category name and press the  refresh button. Then click on the category you need to modify and press the  properties button. Make the necessary changes and press the  save button.



User: ADM      Refresh      **ARTICLE CATEGORIES**      Terminal: Shop


Category Code      Category Name      EQUIPMENT      Search Criteria

Category Code	Category Name	Category Group	iTouch	Published
018	EQUIPMENT	001 - DEFAULT GROUP	No	Yes

## 3. How to Insert a Supplier

Each stock item can be classified under a particular supplier if you wish. Although not compulsory, you can build a list of you suppliers before you start entering your stock items. Alternatively the system comes with one generic supplier and you can classify all your stock with it.

**Step 1** To insert a supplier press on Supplier >> Suppliers (Or click on the Suppliers Quick Button from the main screen).




**Step 2** Press the add  button

**Step 3** For each supplier you need to enter search reference name, the supplier name and choose the supplier family (i.e. local , EU and non EU suppliers). You can also specify other details such as address etc.

**Step 4** Press the  save button.

#### 4. Modify Supplier Details


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If you need to modify an existing supplier, in the main supplier screen where you see a list of all suppliers, locate and highlight, or search for the supplier by entering the supplier name and press the  refresh button. Then click on the supplier you need to modify and press the  properties button. Make the necessary changes and press the  save button.

#### 5. How to Insert an Article

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Your main task before you can start selling is to build your stock (article) list. (Refer to Chapter 9, Article QuickView, for an alternative, faster method on adding and updating Articles)

**Step 1** To add a new article go to Stock >> Articles (or click on the Articles quick button on the main screen) and press on the 'add'  article button.

**Step 2** For each article you need to input:

The *Barcode* (or a Unique Identifier)

The *Article Name* (*This is what is shown on the receipt*)

*Choose the stock Category*

*Choose the Supplier*

*Choose the VAT rate*

Enter the first selling price, which is the shop price (If you input it in the Incl. VAT, the excl. is calculated automatically)

Enter the cost price Excl VAT

These are the minimum fields which need to be entered for any given article.

You can then also specify other details, such as the Brand, the Warranty Period (1 Year, 2 Years etc.), re-order levels etc...

**Step 3** Press the  save button.



*In the Article screen you do not actually specify the quantity you have in stock. In this module you are only building your stock list. To specify your quantities in stock, refer to the Transfer Stock In which is also found under the Stock Menu.*


## 6. How to Update an Article (Description, Price etc...)

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**Step 1** If you need to modify an article you need to access the article screen by going on Stock >> Articles.

**Step 2** You have several options to search for an article. The easiest is to scan the barcode, however you can also search by article name, brand, category, supplier, shelf, vat rate or article reference code.

You then need to press the  refresh button and press the properties  button.

**Step 3** Make the necessary changes and press the  save button.

## 7. How to Transfer in Stock

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Once your articles are entered in the system you will need to do a transfer in to specify your quantities in stock. When doing a Transfer In, you are normally inputting an invoice which you received from your supplier.


**Step 1** To transfer in stock go to Stock >> Transfer In Batch (Purchases).


**Step 2** Select the supplier by clicking on the arrow next to the supplier field, input the invoice number, specify the invoice date and press the start button.

**Step 3** Enter the articles as per invoice by scanning your article barcodes or searching the article manually (press the arrow button near the barcode field). If an article is new you can also press the new article button and enter the new article as described in section 4 above (In fact you can input all new articles also from this shortcut).

**Step 4** For any article you need to enter the cost price and the quantities. You can also modify the selling price or specify the expiry date of an item. When ready press the add button (or F5).

**Step 5** Continue this process for all the articles in the invoice. If you need to change something, just highlight the article, press modify, make the changes and save.

**Step 6** You can also specify an additional cost such as shipping and insurance incurred which will be evenly distributed to the items according to quantities and cost. To do this tick the Equally spread a total additional cost and enter the amount. Press the  refresh button and you would see the total additional cost assigned to each article.

**Step 7** When you are ready make sure that the total cost is equal to the invoice total. If not check and make the necessary adjustments. Press the  save button and the articles will be transferred in.

## 8. How to Check Stock Quantities

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To check how much stock you have for one particular item, in the Articles Screen locate and highlight the article. On the bottom left side you will see how much stock you currently have. If you click on the Stock History Button, you can also see a history of stock movements for that article.

You can issue a stock report from Reports >> Stock Report

## 9. Article QuikView

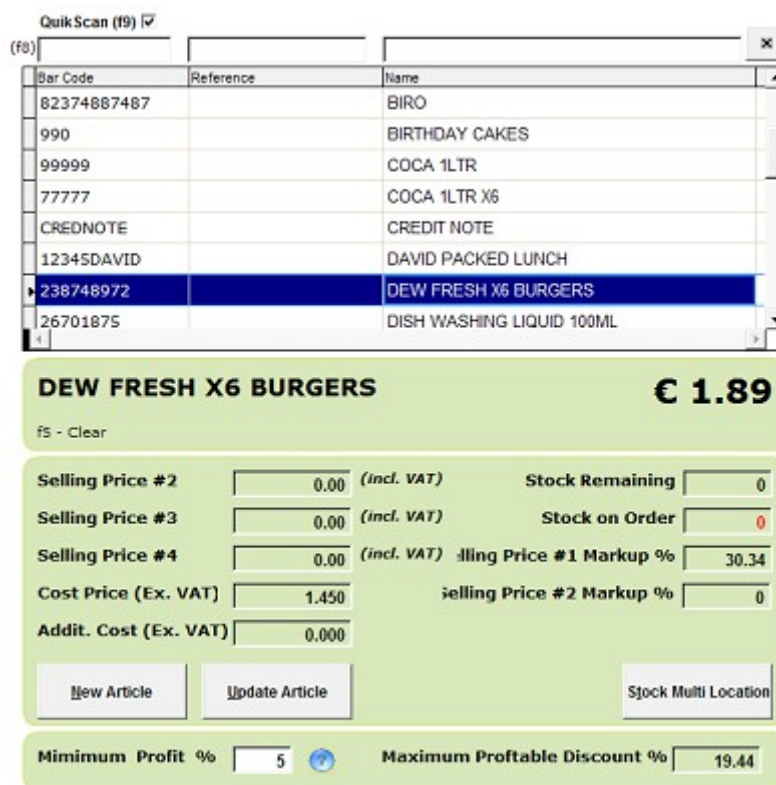
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The Article QuikView screen is designed for fast shop operations, ideal when you are using a barcode. Through this screen you can quickly:

- Check if an Article Exists
- Check Prices
- Add a new Article
- Change prices, category etc...
- Check Stock Availability
- Check Markup

Open the Article QuikView Screen from SALE >> Article QuikView

If on the Article QuikView you cannot see two buttons at the bottom, "NEW ARTICLE" & "UPDATE ARTICLE", then close the screen from the top right button, go to "FILE" >> "PREFERENCES" , and un-tick the CheckBox "Hide Second Tab in Article QuikView".



This is how the Article QuikView should look.

Before scanning an article, make sure that the cursor is blinking in the Barcode Search Box, or Press F8. Also make sure that the QuikScan checkbox is switched on.

You can now start scanning different items, without touching the keyboard or mouse. With every item you scan, the system will give you details of the Selling & Cost Prices, Stock Quantities, and some further info such as the Markup.

After scanning an item, if it exists and it is not discontinued, you can click on the Update Article button to change the price, and any other details.

If after scanning an item it does not come up, then you can click on the "NEW ARTICLE" button to add it in the system. Refer to Chapter 5, Step 2, for more info on what fields you need to fill up for each article.



## 10. Barcoded Prices

This chapter mostly applies to Grocery Stores and confectioners.

You might be selling pre-packed items, such as ham, cheeses & meat, where the price of each packet varies due to different weight. However you might notice that the barcode itself includes the price.

iLabPOS can automatically read the price when you scan the barcode, however you need to pre-set it.

Lets say, for example, you have a pre-packed packet of Ham with the following barcode:

270312003996

The price of the packet in this case is EUR3.99

The first 6 digits will indicate that this is Ham, the last digit is thrown away, whilst the digits 00399 are the price.

So, when creating a stock item (New Article, refer to chapter 5), you need to:

1. Type in 270312 as the Barcode (You should always use the first 6 digits of your barcode)
2. Tick the checkbox "Price in Barcode" and choose "2" Decimal Places
3. Complete the remaining fields (Article Name, Category, VAT Rate, Supplier)

User: ADM Terminal: Shop

**ARTICLE - DETAIL**

Bar Code / Code: 270312  Kit?  Article ref. code:

Article Name: PREPACKED HAM SLICES (For optimum use with i-Touch, use a space after every 13 chars)

Full Description: PREPACKED HAM SLICES

Stock Category: 002 - FOOD Department (VAT%): E - EXEMPT

1st Supplier: MIZZI Brand: NOT SPECIFIED

Date Added: 06/02/2016 Stock Qty.: 0 Last Sold: // Discontinued:

	Excl. VAT	Incl. VAT	
Selling Price #1	0.000	0.000	€
Selling Price #2	0.000	0.000	€
Selling Price #3	0.000	0.000	€
Selling Price #4	0.000	0.000	€
Consumer Price (rnp)	0.000	€ (incl. VAT)	

Price in Barcode:  Decimals: 2

Warranty Text:

Re-order Point: 0

Re-order Qty.: 0

Now test the item you have by scanning the barcode in the Cash Sale or iTouch modules. If the price is not correctly interpreted, try switching to 3 decimal places. The decimal places counter depends on the standard used by your pre-packed supplier.